

ABSTRACT OF THE DISCLOSURE

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3 A method and system for formulating a stock portfolio employs weighting preset
4 parameters that are applied to a multiplicity of stocks received from a database. The
5 weighted parameters are applied to each stock and a Rating is generated for each of
6 the stocks in the database. The parameters and Rating is used to create a Portfolio
7 of a number of stocks. Selected stocks are purchased if they meet the limits set by
8 selected weighted parameters. When a limit associated with the purchase price is
9 reached for one of the Portfolio stocks, the stock is sold and another stock that
10 meets the criteria for a purchase is added to the Portfolio.